

SGD-1. Facilitator Preplanning Worksheet
General questionnaire for the meeting with the sponsor

1. What is the organizational issue we are targeting with this curriculum?
2. What is the level of knowledge in your group of the PMBP? Where would you put it in terms of a rating of 1 (minimal understanding) to 10 (high level of understanding)?
3. Based on level of knowledge, what type of facilitation are you looking for?
4. Does your organization currently have a plan for PMBP training? If so, can a copy be obtained?
5. What are the relative roles between workshop sponsor, facilitators and participants? Who will do what?
6. Has everyone in your group reviewed the course material to be discussed at the SGD? If not, what is the expectation for completion? How has that been communicated?
7. How big is your group? What communication has your group received about the PMBP curriculum and small group discussion? What advance message have you sent (or will you send) regarding the small group discussion? When do you want to do the SGD? How much time are you willing to put into the SGD? How do you plan to fund it?
8. What is your expectation regarding attendance and who will attend? What accountabilities will you use to ensure that level of participation?
9. How do you anticipate measuring the effectiveness of the small group discussion?
10. What questions in the small group discussion questions would you want to focus on? Any others you would like to ask?
11. What facilitation methods do we want to use? Break-out? Group brainstorming? Exercises? Others?
12. How will we handle disruptions? Tangents? Time management?
13. What roles will we each play? What type of facilitator is needed? Who will do what? Who will open? Who will close? Who will do the AAR?

14. Review a rough draft agenda and facilitate a discussion with the sponsor by asking open-ended questions clarifying purpose, objective, and content of the SGD.
15. How will we handle breaks? Ground rules? Lunch? Coffee? Donuts? Snacks?
16. Who will be the participants? Any mentors? Coaches invited? How will leadership be informed? Involved?
17. What follow-up to the SGD do you anticipate? What will happen next? What do you want my role to be?
18. How do you anticipate the results of the SGD will be communicated and shared with others?
19. How will we recognize the group for having completed the SGD?